

NEW HOME AFFORDABILITY ANALYSIS

Prepared For: _____

Date: _____

Income & Savings

Annual Income before Tax	\$
Sinking Fund for down payment?	Yes No
Average Annual Savings towards Purchase	\$
Years until Purchase	

Purchase Budget

Purchase Budget	\$
Target Mortgage	\$
Target Monthly Payment	\$
Long Term	30-yr Fixed 30-yr fixed FHA 30-yr fixed VA 30-yr fixed USDA 20-yr fixed 15-yr fixed
Target Interest Rate	%
Location (City, State)	

Down Payment

Down Payment (20% or more to avoid Prime Mortgage Insurance)	\$
Down Payment Amount	\$
Current Sinking Fund Balance	\$

Housing Expenses

Property Tax Rate		Yearly Property Taxes	\$
Home Owner's Insurance		HOA Fees	\$
Other housing expenses (Utilities, repairs, etc.)	\$		\$
	\$		\$
	\$		\$

Additional Information

Selling existing property?	Yes No
Value of existing property	\$
Existing debt for property	\$

Recommended Next Steps

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